

# *Active Directory Federation Services (ADFS) in Production Project Charter*

*Version 1.2*



Consolidated Technology Services • WA

## Document Revision History

Version Number	Date	Description
0.0	8-7-12	Initial charter from RonM
1.0	8-21-12	Updates based on feedback from group
1.1	8-30-12	Updates per project team
1.2	9-5-12	Added info about creating a service

Table of Contents

PROJECT STATEMENT ..... 4

BUSINESS DRIVERS/BACKGROUND..... 4

GOAL STATEMENT ..... 5

OBJECTIVES ..... 5

SCOPE..... 7

COST PROJECTION ..... 8

PROJECT ORGANIZATION ..... 9

PROJECT APPROACH..... 9

ASSUMPTIONS AND CONSTRAINTS ..... 9

PERFORMANCE MEASURES/OUTCOMES ..... 10

ACCEPTANCE ..... 10

## **Project Statement**

The project team will design, implement and test the deployment of redundant Active Directory Federation Services (ADFS) components in the Production environment. This work will be completed by 11/30/2012.

## **Business Drivers/Background**

In line with the OCIO strategic direction, the State of Washington is currently evaluating hosting several applications in the “cloud” and also deploying enterprise applications. It is desirable that state employees accessing cloud-based and enterprise applications be able to use their existing user accounts and passwords rather than having to maintain separate user accounts and passwords for each service. This is typically referred to as “Single Sign On” (SSO).

Due to increasing interest in the SSO technology, it was decided that CTS should move forward with the production ADFS deployment although there is not currently a commitment for users to adopt it. Adding the ADFS infrastructure to the Enterprise Active Directory (EAD) environment will give application developers a method for using the state’s EAD forest to authorize access into applications not in the EAD forest. The developers will need to make their applications “claims aware”.

The core components that will be deployed are the ADFS proxies and ADFS servers. All servers will be fully redundant and disaster recoverable.

## Goal Statement

A production-ready deployment of Active Directory Federation Services (ADFS) in the Enterprise Active Directory (EAD) forest.

## Objectives

In support of the project goal, CTS will complete the following objectives:

- Develop all required project management documentation.
- Create a detailed ADFS Production Design.
- Install and configure Active Directory Federation Services (ADFS) servers in the production EAD environment per the detailed design.
- Configure proxy services for ADFS.
- Verify functionality using a claims aware application for verification of Single Sign On (SSO).
- Create the rate structure for customers to order the ADFS service upon completion.
- Create the on-boarding process for new customers

## Project Deliverables

<b>Initiate</b>	
	Project Registration
	Project Charter
<b>Planning</b>	
	Project Plan
	Production Design
<b>Execute</b>	
	Procurement of hardware and software
	Network installed and configured
	Load-balancers installed and configured
	Proxy solution installed and configured
	ADFS servers installed and configured
	Firewalls installed and configured
	ADFS software installed and configured to work with Sharepoint
	Sharepoint installed and configured to work with ADFS
	Rate structure and on-board process completed
<b>Close</b>	
	Post Implementation Review
	Complete project documentation

## High-Level Schedule

Start Date:	Completion Date	Key Milestone	Description
	8/9/12	Project Kickoff	The formal start of the project, make sure everyone (team, stakeholders) has a common understanding of the project and their roles.
8/9/12	8/14/12	Initiate Phase Complete	The charter and required project management documents are complete and approved by management.
8/9/12	8/21/12	Production Design Approved	The necessary groups have been consulted and approve the technical design.
8/22/12	9/28/12	Procurement Complete	The necessary hardware, software, licensing and certificates have been ordered and received.
8/22/12	9/4/12	Install and configure Oly Network Complete	The network configurations have been added in Olympia.
8/22/12	9/10/12	Install and configure Spo Network Complete	The network configurations have been added in Spokane.
9/11/12	9/18/12	Firewall Configurations Complete	The Firewall rules have been configured and implemented for ADFS.
9/11/12	10/8/12	Install Servers Complete	The procured servers (VM & physical) have been racked, network connected, software loaded, and configured per the technical specifications.
10/9/12	10/22/12	Configure Proxy Solution Complete	The agreed upon proxy solution is installed and configured to work with ADFS.
10/23/12	11/22/12	Configure ADFS	The ADFS application is installed & configured on the necessary servers and configured to work with Sharepoint.
9/11/12	11/23/12	Rate Structure and On-board Process Complete	The necessary cost center, and business components are customer ready.
11/23/12	11/30/12	Closeout	Post Implementation Review (PIR) and sharepoint closeout are complete.

# Scope

## In Scope:

- The design, installation and configuration of ADFS for the production Enterprise Active Directory (EAD) to enable claims verification.
- A redundant ADFS infrastructure design and implementation in Olympia.
- An ADFS design and infrastructure capable of being manually recovered in Spokane in case of regional emergency.
- Configuration of the ADFS environment to communicate with the CTS sharepoint environment for test and verification of claims awareness.
- The development of a rate model and other activities related to standing up a new service.

## Out of Scope:

- The design, installation or configuration of any ADFS infrastructure to communicate with any other application except for CTS sharepoint.
- The Directory Synchronization (DirSync) components.
- The Exchange hybrid server components.
- External agency testing. (These will be handled as separate projects.)
- Modification to the pre-production environment. (Will be done in separate effort.)

## Cost Projection

The total estimated cost of the project.

	One-Time Costs	Monthly Costs
Hardware (2 ADFS servers, 2 Proxy servers)	\$22,100	
Software (6) Windows @ \$463, (2) SCOM @ \$275, (2) 2-year certificates @ \$350	\$4,050	
Labor and Benefits	\$0	
Admin	\$0	
Training	\$0	
Other (FTE Costs – approx 420 hrs)	\$30,000	
- VM costs (4 virtual servers and storage)	\$240	\$1,007
- Firewall costs	\$250	\$500
<b>Overall Total</b>	<b>\$56,640</b>	<b>\$1,507</b>

**Initiate / Planning Phase (30 hours) – CSD PM, CSD Design Group, TSD Design Group, ESS Design Group:**  
Create charter, Review / approve the conceptual design and detailed design.

**Execute Phase (370 hours) – CSD PM, CSD Server Support, CSD Messaging Group, ESS Firewalls, ESS DNS, ESS Gateways, TSD EDN Group, NCC technicians:**  
Install / Provision servers, configure network and load-balancers, configure Firewalls, Configure DNS, configure servers and software, Develop Service model

**Close-out Phase (20 hours) – CSD PM, technicians:**  
Post Implementation Review (PIR), update documents, closeout project



# Project Organization

## Roles and Responsibilities

Roles and responsibilities assigned to each individual or group resource to the project.

### **Executive Sponsor: Christy Ridout**

- Provide overall guidance on project scope and direction.

### **Sustaining Sponsors: Wendy Huff (CSD), Agnes Kirk (Security), Michael Martel (Network)**

- Provide overall guidance and direction to staff in respective divisions.

### **Project Sponsor: Lance Calisch**

- Provide oversight of project.
- Create Rate and Service model

### **Project Manager: Ron Mathews**

- Oversee the project and coordinate all project work.

### **Design Team: Karen McLaughlin, Joel Eussen, Matt Stevens, Paul Kramer, Aaron Robel**

- Review proposed design to ensure that adherence to DIS strategic technology vision.
- Serve as resources to all teams in evaluating and proposing technical alternatives for resolving project issues.
- Serve as technical leads for the project.

### **Project Support: Jay Knowlton, Donna Martin, Ken Joubert, David Salang, Brook Schurr, Joel Dalke**

- Assist with design validation, implementation and testing.
- Assist with the creation and maintenance of technical documentation.

## Project Approach

- Project will be tracked using standard project management processes.
- Project Manager will conduct weekly status meeting with Project Team, Project Sponsor and any affected client agencies.
- Documentation will be maintained in both the CSD Sharepoint site and CTS shared drive.

## Assumptions and Constraints

### **Assumptions:**

- The necessary technical resources will be assigned for the project.
- There will be sufficient funding for infrastructure items.

### **Constraints:**

- Design and technical staff are redirected to critical operation issues and tasks.

## Performance Measures/Outcomes

- A completed production technical design that will provide a redundant, disaster recoverable environment.
- A working ADFS installation.
- A configuration that supports Sharepoint logon access through ADFS.

## Acceptance

We, the undersigned project members, have reviewed this document and approve its contents:

<b>Name and Title</b>	<b>Signature</b>	<b>Date</b>
<i>Christy Ridout – Executive Sponsor</i>		
<i>Wendy Huff – Sustaining Sponsor</i>		
<i>Agnes Kirk – Sustaining Sponsor</i>		
<i>Bruce Shurtz – Sustaining Sponsor</i>		
<i>Lance Calisch – Project Sponsor</i>		
<i>Karen McLaughlin – Design Team</i>		
<i>Jay Knowlton – Project Support</i>		
<i>Ron Mathews – Project Manager</i>		